infancy. The mass of the people—the peasants—still supply their own modest wants almost entirely. The women make, in their own homes, the garments required by the household for summer and winter, using home-spun wool and home-woven cotton. A village expert fashions the leather embroidered coats worn by men and women alike. In the mountains, often the foot-gear is still of local manufacture. (Hats and shoes are mainly imported from the town, however.) Houses are made of locally-felled and sawn timber, and all the household utensils and furniture, except the crockery, are made in the village.

THERE is little accumulated capital in the country, and it is natural that modern industrial developments should tend to be based on local raw materials and traditional skill. Home-grown wheat, maize and barley feed the flour-milling and brewing industries which are well developed. There are about 400 large flour mills, steam driven and capable of producing graded flour. These are mainly in the Old Kingdom and grind wheat chiefly. The wheat districts of Bessarabia and Bucovina have a number of modern mills, as well as a large number of windmills, but the maize districts still use the old-fashioned water-mills, which can only grind coarse meal. The brewing industry has been encouraged by the government, partly with the idea of reducing the consumption of the potent alcoholic beverage, "ţuica", which the peasants distil from plums. Most of the breweries are either in Bucureşti and Iaşi or in one of the larger Saxon towns of Transylvania. Potato and maize spirit are made on a large scale, particularly in Transylvania, for export.

FOR POTTERY MAKING the Dobrogea supplies a good kaolin, but the industry has not reached a high stage of development, although the ancient peasant pottery has much merit in form and decoration. This is due in part to lack of suitable fuel for the furnaces.

WITH the acquisition of Transylvania, Roumania has become independent in the matter of that most important constructional commodity, cement.

THE TEXTILE INDUSTRY is still backward. The post-war development is chiefly in the Banat, where, under protection, silk, artificial silk, cotton and wool have made

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without much success, and was therefore [illegible] to her former practice of importing [illegible].

In February 1942 it was reported that with imports from Italy, Turkey and Croatia, Rumania had an eight months' supply in hand.

Under the 1942/43 Italo-Rumanian agreement Italy is providing her with 1,750 tons of chestnut extract, 1,000 tons of sumach and 735 tons of other materials. Turkey also agreed to supply her in 1942 with 1,000 tons of valex and 2,500 tons of valonea.

D. BUILDING MATERIALS AND CEMENT

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The building materials industry in Rumania is on a small scale and not highly mechanised, employing a total of 16,000 workers in 1937, while the value of production in that year amounted to 1·6 milliard lei, about 2½ per cent. of total industrial production. In the decade before the war cement, which is the most important branch of this industry, had a steadily increased output reaching in 1939 a total of 531,000 tons, with a 800,000 ton capacity. Small quantities had to be imported.

The most important cement firms are at Cetate Vodă, Turda, Dudești, and Fieni. Since the war, due to limited building activity, consumption of cement has decreased, and was reported to have been 314,000 tons for the first ten months of 1942, the bulk of which was used for military requirements.

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After the recapture of Northern Bucovina and Bessarabia in mid-1941, a considerable amount of repair work had to be undertaken as a result of war destruction; but at the beginning of 1942, due to raw material and labour shortage, all further reconstruction in these two provinces was forbidden. Later, in February, 1943, it was [illegible]

339 [656] came into force forbidding construction throughout the country for the duration of the war of private buildings requiring either iron, steel girders, sheet-iron or other sheet-metal roofing.

In 1942 production of bricks and tiles was reported to have been sufficient to meet the reduced requirements. During the war period there have been considerable exports of asphalt and tarred board for roofing, the latter mainly to Italy. [439]

E. GLASS

323 The glass industry employed 6,000 workers in 1937 in 19 glass factories and 20 glassware factories, the most important of which were the Vitrometan Fabrica de Sticlarie S.A. of Mediaș and the Fabrica de Sticlarie Turda S.A. of Turda, both producing sheet-glass and hollow-ware.

Production did not cover the requirements of specialised types, which were imported from Germany and Czechoslovakia. During the war period window-pane production has been adequate for requirements and small quantities have been manufactured for Germany; while under the 1942 Turco-Rumanian Trade Agreement Rumania agreed to supply both window-panes and glassware.

F. CERAMICS

The ceramic industry employed 1,600 workers in 1937 in 33 factories, and the value of production was 112 million lei. Most of the raw materials for this industry are found in the country, and there has been no difficulty in supplying these during the war period. Apart from the mechanised industry, ceramics are produced in normal times on a comparatively large scale by the peasants. The principal factories are the Nitrogen S.A. in Tărnăveni, the Crivul S.A. in Timișoara and the Uzinele Ceramice S.A. in Ploești.

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